

Record Plan Set Process

NOTE:

PM = Project Manager

DPL = Design Phase Leader

The documentation below reflects **PM/DPL**. The intent is that if the project is being designed in-house, the GDOT Design Phase Leader (DPL) will handle this task. If the project is being designed by a Consultant, the Project Manager (PM) will handle this task.

NOTE:

Record plan sets are project plans or layouts that serve as a snapshot of the design at a particular project milestone. Record plan sets will be stored in the project's electronic file in a specific location for project team members to easily locate and use. A record plan set submission will include PDF files (plan sheets or layouts) along with design files (CAD, etc.) used to create the PDFs. Record plan sets should set the context for coordination among the project team, particularly between the design and environmental practitioners. The record plan sets are:

01 – Environmental Survey Boundary

02 – Concept Report Layout - see “Concept Report Approval Process” workflow for details

03 – Public Meeting Layout

04 – Preliminary Plans to GDOT Offices (or 04 – Geometry QC Plans)

05 – PFPR Plans - see “PFPR Packages” workflow for details

06 – Corrected PFPR Plans - see “PFPR Packages” workflow for details

07 – ROW Plans Approval - see “Right-of-Way Plans Approval and Revision Process” workflow for details

07a – Interim FPR Plans – see “Interim FPR Process” workflow for details (folder to be created)

08 – Environmental Lockdown Plans (or 08 – Permit App Plans)

09 – FFPR Plans - see “FFPR Packages” workflow for details

10 – Corrected FFPR Plans - see “Corrected FFPR Packages” workflow for details

11 – Final Plans - see “Final Plans Submission Process” workflow for details

12 – Bid Set – Letting - see “Advertisement/Letting/Award Process” workflow for details

For all record plan set submissions that do not have separate workflows (01 – Environmental Survey Boundary, 03 – Public Meeting Layout, 04 – Preliminary Plans to GDOT Offices, and 08 – Environmental Lockdown Plans), the PM/DPL should follow the steps below within the appropriate record plan set folder.

1. The PM/DPL will copy all files (ie: CADD files and PDF files) used to produce the milestone plans into the appropriate *PI\Record Plan Sets* folder in ProjectWise. If the files being copied have versions, the user will be prompted whether to bring the older versions with the files. Select **No**.
2. The PM/DPL will run the *RefScan* utility on all DGN files to correctly associate the reference files in this new location. Instructions for running the utility are found [here](#).

*****NOTE:** If the dialog box does not appear to allow the user to set the Document Type in the steps below, please contact the Solutions Center by email with a subject line of "ProjectWise" and request that the ProjectWise Document Wizard be installed.

3. For all files, the PM/DPL will complete the document properties in the *PI\Record Plan Sets* folder, using the **Assign Document Type** right-click command to set all document types to set all plan PDF files to the **Working Plans Document Type**.***
4. The PM/DPL will Set Final Status on all files in the *PI\Record Plan Sets* folder in ProjectWise.
 - a. Right-click on the file(s)
 - b. Select **Change State=>Set Final Status**